

# Residential Project Detail Form

## APPLY

Customers interested in Me<sup>2</sup> loans can get pre-approved for a loan online at:

[www.summitcreditunion.com/borrow/energy-efficiency-loans](http://www.summitcreditunion.com/borrow/energy-efficiency-loans), by visiting a local Summit Credit Union branch, or calling (800) 236-5560 (press 2 for loan information). For Me<sup>2</sup> loan customers, bring this form, your contractor bid, and income verification to your local Summit Credit Union branch to close the loan.

## SUBMIT

Me<sup>2</sup> bonus incentives are available to income-eligible households as defined by Focus on Energy's Tier 2 incentive program (<https://www.focusonenergy.com/Tier2>). To receive Me<sup>2</sup> bonus incentives, send a copy of this form, your Me2 Completion Certificate and your Focus on Energy approval letter for Tier 2 incentives to [Me2@Slipstreaminc.org](mailto:Me2@Slipstreaminc.org) or mail to: **Me2 Program, 431 Charmany Drive Madison WI 53719**

*This application is for qualified items installed between September 1, 2020 and December 31, 2020. Complete applications must be received within 60 days of installation. Me<sup>2</sup> bonus funding is limited and will be paid out on a first come, first served basis. Me2 Bonus Incentives plus Focus on Energy Incentive cannot exceed the cost of the improvement. Me2 bonus incentives are only paid once per household.*

## QUESTIONS?

Contact: Jackie Thibert-Blank

Phone: 608.669.9107

Email: [jthibertblank@slipstreaminc.org](mailto:jthibertblank@slipstreaminc.org)

## HOMEOWNERS: Please fill out the following sections:

Section 1: Homeowner Information

Section 2: Property Information & Eligibility

Section 3: Focus on Energy Incentives

Section 5: Terms

Section 6: Payment Authorizations

Section 7: Homeowner Signature

## SECTION 1: HOMEOWNER INFORMATION

Homeowner Name: \_\_\_\_\_

Contact Name (person to whom all communication will be directed): \_\_\_\_\_

Email: \_\_\_\_\_ Phone: \_\_\_\_\_ Alternate Phone: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Preferred Method of Contact: ☐ Email ☐ Phone ☐ Mail

How did you hear about the Me<sup>2</sup> program?

- |   |   |
|---|---|
| <input type="checkbox"/> City of Milwaukee website            | <input type="checkbox"/> Previous program participant _____ |
| <input type="checkbox"/> Contractor or their website          | <input type="checkbox"/> Someone else you know _____        |
| <input type="checkbox"/> Summit Credit Union or their website | <input type="checkbox"/> Other _____                        |
| <input type="checkbox"/> Event _____                          |   |

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## SECTION 2: PROPERTY INFORMATION & ELIGIBILITY

Property Address (site of improvement, if different from above): \_\_\_\_\_

City Milwaukee State WI Zip: \_\_\_\_\_

### ELIGIBILITY

You are eligible for Me<sup>2</sup> financing if your home meets the following criteria. Please confirm your eligibility by checking all of the following boxes.

- ☐ Property to be upgraded is located within the City of Milwaukee
- ☐ Single-family home, duplex, or triplex (3 units or less)
- ☐ Owner of building must be listed as an individual or living trust and not as a LLC or form of business
- ☐ No delinquent property taxes are due to the City of Milwaukee on the property (for Me<sup>2</sup> loans only)
- ☐ I will use a Participating Me<sup>2</sup> Contractor to complete the project

## SECTION 3: FOCUS ON ENERGY INCENTIVES AND ME<sup>2</sup> BONUS INCENTIVES

You may be eligible for Focus on Energy Tier 2 incentives and Me<sup>2</sup> Bonus Incentives if your household income level falls below the upper limits outlined below:

Household Size	Annual Income Upper Limit
1	\$38,231
2	\$49,995
3	\$61,757
4	\$73,521
5	\$85,285
6	\$97,048
7	\$99,253
8	\$101,460

If you qualify, download the [Tier 2 Income Eligibility Application and Guidelines](#) from the Focus on Energy website and submit it directly to Focus on Energy along with the required income documentation. **If Focus on Energy approves you for Tier 2 incentives, they will send you an approval letter. Submit a copy of the Focus on Energy Tier 2 approval letter to Me<sup>2</sup> along with this completed form and Me<sup>2</sup> Completion Certificate to receive your bonus incentives.**

Please choose the level of incentives you have been approved for: ☐ Tier 1 ☐ Tier 2

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## SECTION 4: PROJECT DESCRIPTION & COST (TO BE COMPLETED BY THE CONTRACTOR)

Category	Description	Project Cost	Focus on Energy Incentives		ME <sup>2</sup> Bonus Incentive (Tier 2 approved customers only)	Net Cost (Project cost minus INCENTIVE)
			Tier 1	Tier 2		
Air Sealing	ENERGY STAR Qualified Air Sealing (Energy assessment required)		\$500	\$800	\$400	
Insulation	Attic Insulation		\$400	\$500	\$200	
Insulation	Foundation Insulation		\$100	\$150		
Insulation	Wall Insulation		\$300	\$300		
Insulation	Duct Sealing & Insulation		\$50	\$50		
Furnace	95% AFUE Single- or Multi-Stage Natural Gas		\$50	\$350	\$400	
Furnace	96% AFUE Single- or Multi-Stage Natural Gas		\$100	\$450	\$400	
Furnace	97%+ AFUE Multi-Stage Natural Gas		\$150	\$550	\$400	
Central AC	16+ SEER when installed at the same time as a qualifying furnace		\$50	\$50		
Air Source Heat Pump	16+ SEER, 8.4+ HSPF (propane, oil or electric furnace only; cannot be a mini-split or ductless system)		\$300	\$300		
ECM	ECM Replacement (must replace existing PSC Motor)		\$50	\$50		
Boiler	95%+ AFUE Natural Gas Home Heating Boiler		\$400	\$550	\$400	
Water Heater	Indirect Water Heater installed at the same time as a qualifying boiler		\$100	\$150	\$200	
Boiler	95%+ AFUE Natural Gas Combination Boiler		\$500	\$675	\$400	
Thermostat	Smart Thermostat installed by a qualified HVAC contractor. For use with natural gas furnace, natural gas boiler or air source heat pump only.		\$50	\$50		
	Single Package Vertical Unit, ≥ 90%+ Thermal Efficiency, NG, ≥ 10.0 EER Cooling		\$150	\$150		
	Single Package Vertical Unit, ≥ 90%+ Thermal Efficiency, NG		\$100	\$100		
Heat Pump	Focus on Energy approved Packaged Terminal Heat Pump. Enter Efficiency Rating: _____		\$100	\$100		
Heat Pump	ENERGY STAR® Certified Geothermal or Ground Source Heat Pump		\$750	\$750		
Windows	ENERGY STAR® rated windows (# of windows:); Attic insulation or Air Sealing required		\$0	\$0	\$100 each, Max \$400	
SUBTOTAL					Max \$1,000	

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## SUPPORT MEASURES

(Electrical upgrades, leaking roof, asbestos removal, oil tank removal, etc. necessary to complete above improvements. This category may not exceed 25% of the above subtotal)

Measure	Description	Project Cost
1		
2		
3		

**A. TOTAL PROJECT COST:**

**B. FOCUS ON ENERGY INCENTIVE:**

**C. ME<sup>2</sup> BONUS INCENTIVE** (\$1,000 Max):

**D. OUT OF POCKET COST** (Paid by Customer):

**E. REQUESTED SUMMIT PAYMENT:**

(\$15,000 max; subtract lines B, C & D from line A above)

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## SECTION 5: TERMS

By checking the box below, you are certifying the property's eligibility to receive Me<sup>2</sup> Financing and have read and understand the main terms of the program.

☐ I have read and understand the following terms of the Me<sup>2</sup> program.

The City of Milwaukee, the Me<sup>2</sup> program, and Summit Credit Union:

- Recommend you contact your contractor for detailed manufacturer equipment warranties.
- Read and adhere to Homeowner Consumer Tips:  
<https://datcp.wi.gov/Pages/Publications/HI-ConsumerTips136.aspx>
- Do not endorse any particular installation contractor, engineering firm, manufacturer, product, or system design by this offering.
- Are not responsible for any tax liability imposed on the recipient as a result of incentives.
- Make no representation or warranty and assume no liability with respect to the quality, safety, performance, or other aspect of any design, consulting, product, system, equipment, or appliance installed or received and expressly disclaim any such representations, warranties, and liability, including, but not limited to, any implied warranties of merchantability or fitness for a particular purpose. Please contact your contractor for detailed manufacturer equipment warranties.
- Do not guarantee that installation and operation of energy efficient equipment will result in reduced usage or in cost savings.
- Are not liable for any damages, including any incidental or consequential damages, arising out of the operation or malfunction of the products, equipment, or appliances, or the installation thereof.
- Signatory(ies) indemnify the Me<sup>2</sup> program, the City of Milwaukee, their respective affiliates, subsidiaries, parent companies, officers, directors, agents, and employees against all losses, damages, expenses, fees, costs, and liability arising from any design, consulting, product, system, equipment, or appliance.

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- Unless notified in writing, the Me<sup>2</sup> program reserves the right to publicize participation in the program.
- A Me<sup>2</sup> program representative may schedule a site visit to verify that qualified products, systems, equipment, or appliances were installed.

## SECTION 6: PAYMENT AUTHORIZATIONS

At the homeowner's discretion, Summit may either pay the contractor 100% of the loan upon completion of all agreed upon work OR pay a 30% construction advance and the remaining 70% upon project completion. Homeowner should select one of the following options:

- ☐ Pay Contractor only upon completion of the work. Summit Credit Union will issue the Contractor a check 1-2 weeks after the Contractor submits the Completion Certificate, including documentation of City permits.
- ☐ Pay Contractor 30% down as a construction advance and the remainder upon completion. 1-2 weeks after initial loan closing, Summit Credit Union will issue the Contractor a check for 30% of the loan amount. Upon completion of all work, Summit will issue the Contractor a check for the remaining balance 1-2 weeks after the Contractor submits the Completion Certificate.

## FOR ME<sup>2</sup> BONUS INCENTIVES

- ☐ Me<sup>2</sup> Bonus Incentive to be mailed to homeowner
- ☐ Me<sup>2</sup> Bonus Incentive to be paid to installing contractor

## SECTION 7: HOMEOWNER SIGNATURE

To the best of my knowledge, the statements above are complete, true, and correct. I hereby certify that I hold title to the property and am authorized to submit this application. By signing this application, I authorize Summit Credit Union and the Focus on Energy program to release project information such as energy savings estimates to the Me<sup>2</sup> program and its affiliates, including the Wisconsin Energy Conservation Corporation, City of Milwaukee, and US Department of Energy. Submission of this Application Form does not guarantee approval.

Signature: \_\_\_\_\_

Printed Name: \_\_\_\_\_

Date: \_\_\_\_\_

## SECTION 8: CONTRACTOR INFORMATION & SIGNATURE

Contractor Name: \_\_\_\_\_

Authorized Contractor Representative: \_\_\_\_\_

Email: \_\_\_\_\_ Phone: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

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If Check is mailed to contractor: **Incentive Payment Reassignment**- Complete this section only if incentive will be paid to the Landlord or Contractor. IRS form W9 for Payee must be submitted for incentive reassignment.

Payee Name (as shown on attached W9): \_\_\_\_\_

Payee Phone: \_\_\_\_\_ Payee Email: \_\_\_\_\_

Mail Check to: ☐ W9 Address  
☐ Alternate Pay Address

Alternate Pay Address (optional): \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_

Please confirm all of the following statements by checking the following boxes:

- ☐ I am a Me<sup>2</sup> Participating Contractor currently in good standing with the program.
- ☐ I am a Focus on Energy Trade Ally currently in good standing with the program.
- ☐ I have provided this homeowner with a written bid that matches the project description contained in Section 4.
- ☐ To the best of my knowledge, the proposed improvements are eligible for Focus on Energy incentives as noted in Section 4 (except support measures) and I will submit the incentive request to Focus on Energy within 10 business days of project completion. I will utilize the Instant Discount option so that the customer only pays the net project cost after incentives.
- ☐ I acknowledge I will be paid according to the homeowner selection in Section 6 and that it is my duty to submit the Completion Certificate to Summit Credit Union.
- ☐ I will pull the required City of Milwaukee permits for the proposed improvements and will cure any deficiencies that do not pass permit inspection at no additional cost to the homeowner.
- ☐ I will cure any installation deficiencies identified by the Me<sup>2</sup> program staff or Focus on Energy program staff at no additional cost to the homeowner.
- ☐ My bid includes proper disposal/recycling of any waste generated as a result of this project.

To the best of my knowledge, the statements above are complete, true, and correct. I hereby certify that I am authorized to submit this Application Form and affix my signature below. Submission of this Application Form does not guarantee approval.

Signature: \_\_\_\_\_ Title: \_\_\_\_\_

Printed Name: \_\_\_\_\_ Date: \_\_\_\_\_